



Foreign Agricultural Service

**GAIN Report**

Global Agriculture Information Network

Required Report - public distribution

Date: 8/23/2000

GAIN Report #MY0041

## Malaysia

## Poultry and Products

## Annual

## 2000

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### Report Highlights:

**Malaysia is self-sufficient in meeting the country's demand for chicken and eggs. The best prospects for U.S. exporters appear to be in supplying day-old chicks (DOC), broiler grandparent stock, DOC layer parent stock, frozen turkey/turkey parts and frozen chicken parts.**

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Includes PSD changes: Yes

Includes Trade Matrix: Yes

Annual Report

Kuala Lumpur [MY1], MY

## Table of Contents

Executive Summary	Page 1
Production	Page 2
Trade	Page 5
Policy	Page 6
Post Contact and Information	Page 7
PSD for Poultry	Page 8
Export Trade Matrix for Poultry	Page 9
Import Trade Matrix for Poultry	Page 10
PSD for Chicken	Page 11
Export Trade Matrix for Chicken	Page 12
Import Trade Matrix for Chicken	Page 13
Prices Table for Chicken	Page 14
PSD Table for Turkey	Page 15
Export Trade Matrix for Turkey	Page 16
Import Trade Matrix for Turkey	Page 17
PSD Table for Eggs	Page 18
Export Trade Matrix for Eggs	Page 19
Import Trade Matrix for Eggs	Page 20
Prices Table for Eggs	Page 21

## **Executive Summary**

Malaysia is self-sufficient in meeting the country's demand for chicken and eggs, and a net exporter of both the items. Malaysia has one of the highest per capita consumption rates in the world for chicken (32.5 kg) and eggs (298 units). Malaysia is also self-sufficient in meeting its demand for duck meat with per capita consumption at 1.76 kg. The outlook for broiler meat production in 2000 is bright as strong domestic demand continues to drive meat production to a higher level during the last quarter. Likewise, egg production is also expected to show a strong increase in 2000.

The best prospects for U.S. exporters appear to be in supplying day-old chicks (DOC), broiler grandparent stock, DOC layer parent stock, frozen turkey/turkey parts and frozen chicken parts. There are also opportunities for sales of processed poultry meat and egg products (yolk and albumin powder). Joint-venture investments in the production of deli meat and egg products may also be an area worth exploring by U.S. business investors.

(NOTE: The market situation in East Malaysian states of Sabah and Sarawak is not fully covered in this report. As data and information from East Malaysia are not readily available, the information in this report pertains primarily to Peninsular Malaysia where the bulk of the country's poultry production and consumption takes place. However, East Malaysia should not be overlooked by potential U.S. exporters as it does offer some excellent opportunities for sales of frozen chicken and in particular, chicken parts).

## **Production**

### **1. Poultry meat - Broiler**

#### **-- Breeding Stock (Broiler)**

The Malaysian poultry sector relies solely on high quality exotic breeds from the United States, Europe, Canada, and Australia. According to a survey conducted by the Malaysian Department of Veterinary Services (DVS), the standing broiler parent stock population rose 2.3 percent to 3.6 million birds in 1999. There are five fully integrated and 19 non-integrated parent stock breeder farms in the country. The principal breeds are: Avian (40%), Arbor Acres (29%), Cobb (13%), Ross (8%) and Shaver (4%). The domestic industry is about 62 percent self sufficient in the production of parent stock. Since there are only two grandparent farms (Avian and Arbor Acres), about 38 percent of the day-old parent stock were imported from North America, the EU and Thailand.

The broiler breeding companies produced 362 million-day-old chicks in 1999, a 3 percent drop from 1998. Output is expected to increase to 366 million birds in 2000. In tandem, total supply of 42-day-old broilers is expected to increase to 355 million birds. Over the years, integrators have been increasing their market share, pushing out the smaller non-integrated breeding farms. Following the Nipah Virus outbreak in the swine sector in early 1999, the GOM allowed day-old chick imports to meet the surge in demand for broiler meat. Most of the increases in imports were from neighboring Thailand. The tight supply situation is expected to continue for most of 2000.

In the near term, imports of parent stock will also continue to increase to meet the demand from the non-integrated breeders. However, as the integrators expand their share of the market, the range of breeds available domestically is expected to narrow in the future. Limiting factors in importing breeding stock include adaptability to the harsh tropical weather conditions and/or tropical poultry diseases, and the price competitiveness in the Malaysian poultry sector.

Table1: Imports of day-old chicks:

Countries	Quantity (Unit)	
	1998	1999
Thailand	155,177	6,126,360
U.S.A.	1,193,407	877,538
China	100,660	346,595
Singapore	70,925	253,000
Netherlands	40,176	235,978
France	45,442	176,073
United Kingdom	340,915	162,752
Indonesia	287,661	121,810
Germany F.R.	199,414	119,720
Korea, Rep. of	0	87,650
Belgium	29,110	52,566
Japan	57,950	30,080
Canada	168,052	19,030
Denmark	0	17,895
Switzerland	0	10,120
Philippines	7,280	9,776
Taiwan	0	8,625
<b>--TOTAL</b>	<b>2,696,169</b>	<b>8,655,568</b>

Source: The Department of Statistics, Kuala Lumpur

## **-- Broiler Meat**

1999 brought some cheers to the broiler sector with the recovery of the broiler meat output from the negative growth experienced in 1998. In spite of the ceiling on ex-farmer price imposed by the GOM, the average price of RM 3.14/kg assured a good return to the farmers. Average cost of production was RM 2.81/kg. Integrated as well as non-integrated farms expanded production during 1999.

With the recovery of the Malaysian economy from the South East Asian economic turmoil of the 1997/98, the prospect of a further expansion in broiler production in 2000 looks very bright. Although the industry was faced with an over-supply situation during May and June, the trend is expected to be reversed in the last quarter of the year when the country celebrates Deepavali, Ramadan and Christmas.

## **2. Poultry meat - Turkey**

There is no commercial production of turkey in Malaysia.

## **3. Poultry meat - Duck**

The standing breeder stock population is about 38,500 birds and ducks meat production only amounts to total 72,000 metric tons. Malaysia is self-sufficient in meeting its demand for duck meat with per capita consumption at 1.76 kg. A small increase in duck meat production is expected in 2000.

## **4. Poultry - Eggs**

### **-- Breeding Stock (layers)**

According to a DVS survey, the standing layer parent stock population increased by 13.5 percent to 324,288 birds in 1999. The principal breeds are Lohman (22%), Isa Brown (21%), Golden Comet (17%), Hisex (16%) and Hyline (11%). Since there is no grandparent layer breeder farm in Malaysia, all parent stocks are imported. Essentially all breeds are either of European or U.S. origin. However, the Isa Brown breed was imported from Indonesia. The EU had about a 69% share of the import market in 1999, followed by Indonesia (16%), the U.S. (10%) and Canada (5%). High capital investment involved in establishing modern integrated facilities hinders the emergence of commercial integrators.

In 1999, total production of commercial layer pullets reached 20.3 million and 259,200 birds brought over from the East Malaysian State of Sarawak. The outlook for 2000 is brighter with the industry expecting a 5.3 percent increase from the previous year.

### **-- Egg Production**

The chicken egg industry also has moved rapidly in the direction of large-scale production, with some farms employing various degrees of automation. However, this sub-sector has not seen the same degree of integration achieved in the broiler industry. Egg production dropped 4.8 percent to 5.6 billion units in 1999 and is expected to increase to 5.8 billion units in 2000.

## **Consumption**

Malaysia has one of the highest per capita consumption rates in the world for chicken and eggs. Per capita consumption of chicken is reported at 32.5 kg and eggs at 298 units. Chicken meat is the most popular and cheapest source of meat protein among Malaysians, in large because there are no dietary prohibitions and religious restrictions against chicken consumption.

The surge of quick-service-restaurants (QSR) such as Kentucky Fried Chicken (KFC), McDonald's, A&W, Kenny Rogers Roasters, Taza Bar-B-Q Chicken, Nando's Chickenland (a South-African based chain) have encouraged strong growth in chicken consumption. These chicken-based fast food outlets are constantly whipping out new dishes to attract crowds. KFC through its subsidiary company, Ayamas Food Corporation, supplies chicken to all its 277 restaurants throughout the country. Ayamas also operates retail stores selling dressed and ready-to-serve chicken meals. These take-away fares are very popular with working women who have little time to prepare their family meals.

Home-grown fast food chains such as Marrybrown, Sugarbun, Nineteen O One, Ball Fastfood, all with chicken menus similar to those of KFC, have also expanded, particularly to smaller cities. These local chains creatively incorporate local preparation in their menu. Traditional Malaysian foods such as *Satay Ayam* (barbecued chicken sticks), *Rendang Ayam* (curry chicken with rice), *Ayam Pedas Special* (savory rice and chicken) and *Nasi Ayam* (chicken rice) are popular with patrons. Business in these local chains is reported to be doing well.

In addition, the emergence of other western type restaurants such as American Chili's, TGI Fridays and Mississippi Slim's Real American Barbecue Restaurant, all of which serve a variety of chicken dishes, has helped to increase chicken consumption as chicken products are among the popular items on their menus.

Traditionally, demand for turkey is high during Thanksgiving and Christmas seasons. Hotels feature roast turkey in their menu as part of the celebration offering. High-end retail outlets offer cooked turkeys with stuffings to consumers who wish to order turkey ready-to-eat. However, the trend in turkey consumption is changing especially among Malaysian urban dwellers. With more Malaysians traveling overseas and exposed to western-style foods, they are now more inclined to purchase turkeys for preparation in their own homes. Hotel chefs are also instrumental in introducing roast turkey including Indian style turkey with curry rice stuffings, Malay-style turkey in banana leaf and Chinese barbecued turkey have been included in the menus of food and beverage outlets of 5-star hotels. Retail promotions featuring turkey parts and cooking demonstrations using turkeys in everyday cooking have helped Malaysian consumers appreciate the bigger and meatier bird.

## Trade

Since 1983 the Government of Malaysia began to limit imports of frozen chicken into Peninsular Malaysia by instituting import licensing. The action was taken to protect domestic chicken producers. The states of Sabah and Sarawak in East Malaysia implemented similar restrictions on chicken imports in 1991.

Whole and frozen chickens and chicken parts are imported periodically depending on local supply situations. Some are shipped through Singapore for East Malaysian states of Sabah and Sarawak. In 1999, total imports of frozen whole chicken and chicken parts were valued at US\$34 million. The major suppliers were Denmark (US\$10 million), the Netherlands (US\$7 million) and U.S. (US\$6.6 million).

Further processed products which were exclusively imported before are now locally produced. Chicken

frankfurters, cocktail sausages, burgers and nuggets are produced by Ayamas Food Corporation under its brand name of *Ayamas*, *Ayam Dindings* by Dindings Poultry, *Farm's Best* by Sinmah Food Industries. Local processed products dominate about 90% of the market. Hence, it is difficult for imported processed products to compete on the basis of price. However, there are some high quality products that have found favors with chefs of international hotels and with consumers at the upper income levels.

Since Malaysia is self-sufficient in egg production, fresh egg imports are insignificant. However, imports of egg products including dried egg yolk and egg albumin were about US\$1.1 million in 1999. With the expanding baking industry and an increasing number of cake houses, the primary end-users of these products, significant growth in imports can be expected since local production is nil. Main suppliers of processed egg products are Belgium, United States and the Netherlands.

Since there is no commercial production of turkey in Malaysia, all turkey meat is imported. In 1999, imports of frozen whole turkey and turkey parts totaled 351 metric tons with CIF value of US\$0.8 million. The United States was the only significant supplier capturing more than 90% of the market.

There is a growing niche market for turkey/processed turkey products and this should present opportunities for U.S. suppliers. U.S. exporters should consider establishing a good relationship with a local importer/distributor and conduct jointly funded promotions to increase retailer and consumer awareness and acceptance of these products. Generic market development activities funded by USA Poultry and Egg Export Council, as well as branded promotions by U.S. companies, should be stepped up at the consumer/retail level.

## Marketing

### Marketing Infrastructure/Channels

About 80% of chickens in the country are sold in the wet markets as Malaysian housewives are very particular about the freshness of chicken. Though local councils are enforcing health laws to prohibit chicken slaughter in wet markets, wholesalers arrange to slaughter the birds in selected areas and bring dressed chicken to the marketplace. The remaining 20% of sales occur in modern supermarkets and mini markets as well as numerous retail outlets operated by some of the integrated poultry companies.

Locally, further-processed products are distributed to wholesalers, supermarkets, hypermarkets, catering institutions, restaurants and hotels. Integrators such as KFC Holdings, Dinding Poultry and Sinmah Resources have their own marketing and distribution arms. Since processed products are not subject to government price controls, other integrators are moving into the business. Processed products like nuggets and frankfurters come in colorful, attractive packages to attract customers, especially children. Packages of one-kilo and 340-grams are popular consumer sizes.

## Policy

Currently, there is no import duty on poultry meat and 5% duty on eggs and eggs products. However, import permits from the Malaysian Department of Veterinary Services are required for all shipments of poultry and eggs products into the country.

All poultry shipments must be accompanied by appropriate U.S. Department of Agriculture documentation.



Since Malaysia has a large Muslim population, all poultry products must be certified "halal" and must originate from slaughterhouses which have been inspected and approved by the Malaysian veterinary and religious authorities. Currently, there are twenty-four U.S. poultry facilities approved by the Malaysian authorities. U.S. suppliers who are interested in exporting to Malaysia should contact USA Poultry and Egg Export Council (USAPEEC) to coordinate inspection visits by Malaysian authorities to approve their facilities for "halal" exports to Malaysia.

## PSD for Poultry

PSD Table						
Country	Malaysia					
Commodity	Poultry, Meat, Total				(1000 MT)(MIL HEAD)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Inventory (Reference)	3	0	0	0	0	0
Slaughter (Reference)	346	0	0	0	0	0
Beginning Stocks	26	26	24	28	27	26
Production	615	658	658	690	0	730
Whole, Imports	0	1	0	1	0	1
Parts, Imports	8	12	6	15	0	18
Intra EC Imports	0	0	0	0	0	0
Other Imports	0	0	0	0	0	0
TOTAL Imports	8	13	6	16	0	19
TOTAL SUPPLY	649	697	688	734	27	775
Whole, Exports	0	1	2	2	0	2
Parts, Exports	3	4	3	5	0	6
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	3	5	5	7	0	8
Human Consumption	622	664	656	701	0	741
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	622	664	656	701	0	741
TOTAL Use	625	669	661	708	0	749
Ending Stocks	24	28	27	26	0	26
TOTAL DISTRIBUTION	649	697	688	734	0	775
Calendar Yr. Imp. from U.S.	0	5	0	6	0	7

## Export Trade Matrix for Poultry

Export Trade Matrix			
Country	Malaysia		
Commodity	Poultry, Meat, Total		
Time period	1999 Jan-Dec; 2000 Jan-Apr	Units:	Metric Ton
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Singapore	3476	Singapore	4622
Hong Kong	1404	Hong Kong	404
Brunei	71	Japan	21
Thailand	56	Sri Lanka	12
Indonesia	5	Mauritius	1
Philippines	2		
Mauritius	1		
Total for Others	5015		5060
Others not Listed			
Grand Total	5015		5060

## Import Trade Matrix for Poultry

Import Trade Matrix			
Country	Malaysia		
Commodity	Poultry, Meat, Total		
Time period	1999 Jan-Dec; 2000 Jan-Apr	Units:	Metric Ton
Imports for:	1999		2000
U.S.	4628	U.S.	667
Others		Others	
China	3412	China	1359
Thailand	2782	Thailand	809
Netherlands	710	Germany F.R.	381
Germany F.R.	693	Netherlands	174
Australia	137	Australia	83
Denmark	128	Taiwan	24
Switzerland	98	Canada	24
India	90		
France	48		
Canada	47		
Total for Others	8145		2854
Others not Listed	29		
Grand Total	12802		3521

## PSD for Chicken

PSD Table						
Country	Malaysia					
Commodity	Plty, Meat, Chicken -16 wks				(1000 MT)(MIL HEAD)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Inventory (Reference)	0	3.64	0	4	0	5
Slaughter (Reference)	0	349	0	365	0	385
Beginning Stocks	0	26	0	28	0	26
Production	0	580	0	610	0	640
Whole, Imports	0	0	0	0	0	0
Parts, Imports	0	12	0	15	0	18
Intra EC Imports	0	0	0	0	0	0
Other Imports	0	0	0	0	0	0
TOTAL Imports	0	12	0	15	0	18
TOTAL SUPPLY	0	618	0	653	0	684
Whole, Exports	0	1	0	2	0	2
Parts, Exports	0	4	0	5	0	6
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	5	0	7	0	8
Human Consumption	0	585	0	620	0	650
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	0	585	0	620	0	650
TOTAL Use	0	590	0	627	0	658
Ending Stocks	0	28	0	26	0	26
TOTAL DISTRIBUTION	0	618	0	653	0	684
Calendar Yr. Imp. from U.S.	0	4	0	5	0	6

## Export Trade Matrix for Chicken

Export Trade Matrix			
Country	Malaysia		
Commodity	Plty, Meat, Chicken -16 wks		
Time period	1999 Jan-Dec; 2000 Jan-Apr	Units:	Metric Ton
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Singapore	3469	Singapore	4622
Hong Kong	1404	Hong Kong	404
Brunei	42	Japan	21
Thailand	28	Sri Lanka	12
Indonesia	5	Mauritius	1
Philippines	2		
Mauritius	1		
Total for Others	4951		5060
Others not Listed			
Grand Total	4951		5060

## Import Trade Matric for Chicken

Import Trade Matrix			
Country	Malaysia		
Commodity	Plty, Meat, Chicken -16 wks		
Time period	1999 Jan-Dec; 2000 Jan-Apr	Units:	Metric Ton
Imports for:	1999		2000
U.S.	4265	U.S.	576
Others		Others	
China	3375	China	1359
Thailand	2782	Thailand	809
Netherlands	710	Germany F.R.	381
Germany F.R.	693	Netherlands	174
Australia	137	Australia	83
Denmark	128	Taiwan	24
Switzerland	98	Canada	24
India	90		
France	48		
Canada	47		
Total for Others	8108		2854
Others not Listed	28		
Grand Total	12401		3430

## Prices Table for Chicken

Prices Table			
Country	Malaysia		
Commodity	Plty, Meat, Chicken -16 wks		
Prices in	Ringgit	per uom	Kilogram
Year	1999	2000	% Change
Jan	3.45	3.5	1.45%
Feb	3.5	3.3	-5.71%
Mar	3.5	3.3	-5.71%
Apr	3.5	2.5	-28.57%
May	3.08	2.9	-5.84%
Jun	2.93	3.2	9.22%
Jul	2.98	3.3	10.74%
Aug	2.6		-100.00%
Sep	2.7		-100.00%
Oct	2.7		-100.00%
Nov	3.18		-100.00%
Dec	3.5		-100.00%
Exchange Rate	3.799	Local currency/US \$	



## PSD Table for Turkey

PSD Table						
Country	Malaysia					
Commodity	Poultry, Meat, Turkey				(1000 MT)(MIL HEAD)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Inventory (Reference)	0	0	0	0	0	0
Slaughter (Reference)	0	0	0	0	0	0
Beginning Stocks	0	0	0	0	0	0
Production	0	0	0	0	0	0
Whole, Imports	0	0	0	0	0	0
Parts, Imports	0	1	0	1	0	1
Intra EC Imports	0	0	0	0	0	0
Other Imports	0	0	0	0	0	0
TOTAL Imports	0	1	0	1	0	1
TOTAL SUPPLY	0	1	0	1	0	1
Whole, Exports	0	0	0	0	0	0
Parts, Exports	0	0	0	0	0	0
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0
Human Consumption	0	1	0	1	0	1
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	0	1	0	1	0	1
TOTAL Use	0	1	0	1	0	1
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	0	1	0	1	0	1
Calendar Yr. Imp. from U.S.	0	1	0	1	0	1

## Export Trade Matrix for Turkey

Export Trade Matrix			
Country	Malaysia		
Commodity	Poultry, Meat, Turkey		
Time period	1999 Jan-Dec; 2000 Jan-Apr	Units:	Metric Ton
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Thailand	16		
Brunei	5		
Total for Others	21		0
Others not Listed			
Grand Total	21		0

## Import Trade Matrix for Turkey

Import Trade Matrix			
Country	Malaysia		
Commodity	Poultry, Meat, Turkey		
Time period	1999 Jan-Dec; 2000 Jan-Apr	Units:	Metric Ton
Imports for:	1999		2000
U.S.	351	U.S.	83
Others		Others	
Total for Others	0		0
Others not Listed			
Grand Total	351		83

## PSD Table for Eggs

PSD Table						
Country	Malaysia					
Commodity	Poultry, Eggs				(MIL HEAD)(MIL PCS)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Layers	0	20	0	21	0	21
Beginning Stocks	0	110	0	93	0	98
Production	0	5572	0	5820	0	5990
Hatch Eggs, Imports	0	0	0	0	0	0
Shell Eggs, Imports	0	0	0	0	0	0
Other Imports	0	0	0	0	0	0
Intra EC Imports	0	0	0	0	0	0
TOTAL Imports	0	0	0	0	0	0
TOTAL SUPPLY	0	5682	0	5913	0	6088
Hatch Eggs, Exports	0	4	0	5	0	5
Shell Eggs, Exports	0	583	0	570	0	580
Other Exports	0	0	0	0	0	0
Intra EC Exports	0	0	0	0	0	0
TOTAL Exports	0	587	0	575	0	585
Hatch Eggs, Consumption	0	0	0	0	0	0
Shell Eggs, Human	0	5002	0	5240	0	5400
Shell Eggs, OT. Use/Loss	0	0	0	0	0	0
Other Dom. Consumption	0	0	0	0	0	0
Total Dom. Consumption	0	5002	0	5240	0	5400
TOTAL Use	0	5589	0	5815	0	5985
Ending Stocks	0	93	0	98	0	103
TOTAL DISTRIBUTION	0	5682	0	5913	0	6088
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

## Export Trade Matrix for Eggs

Export Trade Matrix			
Country	Malaysia		
Commodity	Poultry, Eggs		
Time period	1999 Jan-Dec; 2000 Jan-Apr	Units:	Million Ton
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Singapore	457	Singapore	250
Indonesia	130	Indonesia	80
		Hong Kong	1
Total for Others	587		331
Others not Listed	1		
Grand Total	588		331

## Import Trade Matrix for Eggs

Import Trade Matrix			
Country	Malaysia		
Commodity	Poultry, Eggs		
Time period	1999 Jan-Dec; 2000 Jan-Apr	Units:	Million Ton
Imports for:	1999		2000
U.S.	1	U.S.	
Others		Others	
Total for Others	0		0
Others not Listed	1		
Grand Total	2		0

## Prices Table for Eggs

Prices Table			
Country	Malaysia		
Commodity	Poultry, Eggs		
Prices in	M'sian Sen	per uom	Unit
Year	1999	2000	% Change
Jan	20	19.3	-3.50%
Feb	18.9	18	-4.76%
Mar	18.5	18.5	0.00%
Apr	19	16.25	-14.47%
May	21.1	17.3	-18.01%
Jun	20.8	18.5	-11.06%
Jul	20.5	17.8	-13.17%
Aug	19.5		-100.00%
Sep	16.8		-100.00%
Oct	15		-100.00%
Nov	18.1		-100.00%
Dec	20.3		-100.00%
Exchange Rate	3.799	Local currency/US \$	

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